Business Processes Overview

The processes described here were developed by the Training Administration Group (TAG) during the Fit/Gap Session (July 1998), the TAG meeting (November 1998), the Functional Integration Team (FIT) (January 1999), the CHRIS Workshop at the Training and Development Group Coordinating Meeting (March 1999).

The training community continues to refine, improve, and implement new processes through CHRIS modifications. Information is sent out in CHRIS Training Administration Bulletins and is published at http://www.chris.inel.gov/end_user/index.htm.

Note: This appendix is a reference for the CHRIS business processes. To obtain specific instructions on "how to," see the appropriate section of the manual.

Establishing/ Entering Courses

The initial entry of a course into CHRIS is reserved for the Corporate Level as shown in the Security Matrix. The sites then have access to update information.

How to Request that a Course Be Entered

Only DOE courses go into the "Course Table", that is, those that meet "Internal" criteria (see CHRIS TA glossary). The site provides the following information to the Corporate Course Review Screen:

1. Course Title
2. Short Title
3. Min/Max # of Students
4. Course Type
5. Duration in Hours
6. Cost per Student
7. Primary Delivery Method
8. Description
9. Course Objectives
10. Audience
11. Notes
12. Prerequisites
13. Equipment Needed

Guidance on Entering Courses

The same course with a different delivery method is entered as two separate courses.

If the course covers more than one type, enter the primary area for type of course and use "Course Description" or "Course Notes Sections" to highlight the additional types covered by the course.

The "school" fields will be grayed out.

Creation Date	This is the date of entry into the system.
Revision Date	On initial entry, leave this date blank. It is assumed that the course is up-to-date when entered. Later, this will be the date the course revision is approved as determined by the site from which the course originates.

Establishing Course Sessions

Course Sessions are entered by selecting "Setup – Course Session Table.

Course Session Profile Tab

- Duration will default to hours and should carry over from the "Course Table." Override is possible, but should be avoided since DOE measures training time by the hour.
- Cost per student carries over from the course table but can be overridden. Remember to use the "Course Session Cost" page as appropriate and that costs per student (as apposed to per session must be entered through "Student Training."

Location, Vendor Tab

"Location" is used to identify the classroom and the facility address. The "Vendor" portion of this screen associates the vendor and/or instructor with the course session. (Reminder: Only DOE employees should be entered into CHRIS as instructors.)

If facility is not already entered go to "Setup/Training Facility."

Enter the "Vendor ID" or click on the magnifying glass and select "Vendor Type" to view a list of vendors.

If the vendor is not in the system, go to "Setup/Vendor Table."

Only DOE instructors will be entered into the system and the employee identification number serves as the instructor ID number.

Equipment Tab

Select the equipment needed for the class by clicking on the magnifying glass then selecting "Lookup."

Expense Tab

The "Tuition Expense" screen records expenses to the course session. This is an excellent way to track course session codes incurred regardless of the method of course session procurement and payment. Select the tuition expense types for the class by clicking on the magnifying glass then selecting "Lookup."

Registering Students

DOE and non-DOE employees can be registered for external course sessions using "Student Training" and for internal course sessions using "Student Training" or "Course Session Enrollment." Security Level 4 will have access to "Student Training" only. Levels 2 and 3 (course session administrators) will have access to both panels.

Overview of Registration for Internal Session

Occasionally a course session will reach the number of maximum students allowed. When this is the case, the CHRIS operator will get the following processor message:

"This class is full. Change status or cancel action."

If the user cancels the enrollment, it may be necessary to reenter the action later. Rather than doing this, CHRIS allows "wait listing" of students for future sessions of full courses.

Employees placed on a wait list can be moved into an opening for the course session without reentry of their information.

The system allows registration into sessions that overlap in date and/or time, so it is the user's responsibility to check the "Student Training Record" first.

The user, if other than a Course Session Administrator, should not update student status to "complete" for a DOE internal course. The Course Session Administrator does this when the course session is complete and he/she changes the course session status. When the course session status is changed to "complete" the system automatically changes the status of all students with a status of "enrolled" to "completed."

When substituting one student for another, change the status of enrolled student to "Cancel Request for Training." Enroll the substitute as a new action.

To track compliance training, use the "Date Needed" field on either the "Course Session Enrollment" or "Student Training" screen.

Registration for Internal Session

"Course Session Enrollment" is used to register multiple students in a session.

Non-course related activity such as mentoring and self-study can be captured on the "Student Training - Course Student Enrollment" screen by leaving the course code blank and entering a descriptive title.

The "Student Training - Course Student Enrollment" screen is used to enter previously completed courses (prior to implementation of CHRIS or training an employee has taken externally on their own). This should get limited use because the training history will be captured in DOEInfo. It would be appropriate where the person is under a specific training program or has to meet a technical qualification program standard.
Select one of the following for "Attendance" (formally "Status"):

- Approved by Manager
- Authorized by Training
- Cancel Request for Training
- Cancel Request (with Payment Required)
- Cancelled Session
- Completed
- Course Waitlist
- Denied by Manager
- Denied by Training
- Enrolled
- Incomplete or Dropped
- Incomplete or Dropped (with Payment Required)
- No Show
- No Show (with Payment Required)
- Requested
- Session Waitlist

Note: For courses sponsored by MA-31, when all local approval and authorization has been received, the site user should change the "Attendance" to "Enrolled."

Registration for External Session	Use the "Student Training" screen. This is the only registration screen where the course code can be bypassed. Leave "Course Code" blank and complete all other fields, marking the "Attendance" as "Enrolled."
Generating the SF 182	From the "Use - Student Training - Course Student Enrollment" screen, click on the printer icon. In the "Student Training" screen, there is a check box for "Continued Service Agreement." A revised Continued Service Agreement form can be found on the Web at http://www.chris.inel.gov/employee/index.htm. If an agreement is required, go to this site and click on DOE Standard Forms, then scroll down to the SF 182. The evaluation form which the employee must return to the training office upon completion of the course is on the Web at the same URL given above. It can be filled out there and sent via e-mail to the training office.
When to Generate an SF 182	With the implementation of "Workflow," generating an SF 182 is less necessary in general. However, it will remain mandatory in some instances. *Mandatory* — When it is used as the procurement document and submitted to a vendor. *Optional* — The SF 182 may be needed for training approval/authorization. Many offices use their own form to approve training and will only enter the action once it has been approved.

DOE Reports

Reports that can be printed from CHRIS include the following:

- Training Letters
- Individual Development History
- Class Session Roster
- Class Sign-in Sheet
- Class Completion Report
- Certificate of Training

Course Closeout

The accuracy of the CHRIS database as a training management tool depends on timely closing out of course sessions. This is absolutely necessary not only so that prerequisite course completion is recorded prior to enrollment in a class for which a certain course is a prerequisite, but also to insure the accuracy of individual training records. The student's status is only updated to "completed" after the session is changed to "completed" during the close out process.

Corporate or organizational training reports will not reflect the actual status of training if close outs are not done properly. The session will be captured in corporate reports only after it is closed out. It is therefore a good management practice to close out course sessions soon after their completion by following these steps:
Only for those employees who did not complete the session, change "Attendance" on "Course Session Enrollment" as necessary (that is, "No Show," "Withdrawn," etc.). It is critical that this step is done first because after the course session status is changed, the course session disappears from the "Course Session Enrollment" list and cannot be accessed, since only active sessions are shown here. (It will still be accessible using "Course Session Table" under "Setup." This is where the user can make updates to information on a closed out session.).

In the "Course Session Table," change the status from "Active" to "Complete."

Print "Class Completion" report. Student status for students with status of "Enrolled" will be updated automatically to "Completed."